Client Questionnaire

Following are questions and issues that should be covered during early meetings with a client, including general project questions, questions specific to documentation, and questions regarding scheduling, reviews and administrative issues. Thanks to TECHWR-Ler Judy Fraser for providing this awesome summary.

General Project Issues

1. What objective do you wish to achieve with the release of this product?
2. What is the general purpose of the document(s)? (e.g., Training, Periodic Reference, Frequent Reference, Procedural, Installation, Regulatory, or some Combination of these)
3. What percent of the software/project is now complete?
4. What is my level of involvement in the project? (e.g., any or all of researching, writing, editing, typing, design, graphics, working with printer, etc.)
5. Is there existing documentation for this product? (Manual, help, marketing material, etc.)
6. Do you have, or know of, a similar existing manual for a similar product that you like? (e.g., for format, organization, etc.)
7. What other information is/will be available to users? (e.g., Web site, training)
8. How frequently is the product updated?
9. Do all customers upgrade at relatively the same time, or do you support old versions?
10. What changes do you anticipate for this product in the near future (long term)? Would it ever be broken into modules or combined it with another product?
11. Do you anticipate supporting the product on other platforms?
12. What potential problems do you see with respect to completing the document(s) on time?
13. What comments about your documentation have you received in the past from customers?
14. Do you anticipate a product name change?

Documentation Issues

1. What is the most common task they perform? What is the second most common task? What is the third most common task?
2. What type of document(s) should be prepared to meet your users' requirements?
   - Hard copy manual
   - Online manual (e.g., view only with hyperlinks, etc.)
   - Online help (reference, context sensitive, tutorial?)
   - Web site
3. Do you have a preference as to word processor? (Word, FrameMaker, Word Perfect, etc.)
4. Do you have a preference as to help authoring tools? (HelpBreeze, RoboHelp, DocToHelp, HTML)
5. Do you have a preference as to graphics tools and formats? (HiJaak, tiff, bmp, etc.)

6. Do you have current company standards, style sheets, or templates you wish used for this project?
7. What aspects of documentation that you've seen or used do you particularly like?
8. What aspects of documentation that you've seen or used do you not like?
9. Will I design the layout and create templates for the document(s)?
10. What elements are required in the document? (Obviously some of these are at the author's discretion, but some clients expect certain sections in their documents.)
    - Title Page
    - Approval/Sign Off Page
    - Revision History
    - Conventions used in this manual
    - How to use this manual
    - Reference Section to Related Documents
    - Table of Contents
    - List of Tables
    - List of Figures
    - Glossary
    - Quick Reference (Sheets, Cards, separate document)
    - Index
    - Reader Feedback Sheet
    - Other (specify)

Audience

1. What is the primary education level of your users? Secondary level?
2. What technical background do your users have?
3. What is your users' native language?
4. What is their level of familiarity with computers?
5. Have your readers used similar products?
6. Why are they using your product?
7. How often do they use your product?
8. At what organizational level are the users? (e.g., clerical, engineers, management, etc.)
9. Will I be able to run the software on my computer, or do I need access (dedicated machine) at your site?
10. What information is/is not included in the document? (e.g., what assumptions are made about your users; do they already know how to use a computer, windows, etc.)
11. In what kind of environment will the document(s) be used? (e.g., in the field, in an office, on or near an assembly line, etc.)
12. What questions does your help desk/support staff frequently receive from users?
13. What style of writing would be most appropriate to your readers? (e.g., contemporary, elegant, professional, informal, formal, technical, or a combination)

Publication Issues

1. How do you want to distribute the information? (hard copy, network, CD, etc.)

2. How may you want to distribute information in the future? (e.g., hard copy now, but on line help later)
3. What page size will be used for hard copy documents? (e.g., 8 1/2 x 11, etc.)
4. Is the final hard copy document to be black and white only or color?
5. How do you want the final documents delivered? (Hard copy, electronic (email, diskette)
6. Will the document(s) be translated? What language? Do you have someone/firm to do this?

Technical Direction/Assistance

1. Who are my technical contacts (SMEs) for this project and what are their positions?
2. Is there a procedure to follow to get answers to questions? (e.g., can I talk to the programmer, etc. directly, should I use email, schedule appointments, etc.)
3. Get names, titles, email addresses, phone numbers, etc. of SMEs.
4. What is the development/project team's view of documentation? Do they feel it's important to the final product or a "necessary evil"?

The Review Process

1. What is your standard review process?
2. What is the approval process for the documentation?
3. How many people need to review it and who has the final word/sign-off authorization?
4. Is there potential for the product or process to kill or hurt someone, or to damage property?
5. If yes, to above, will a legal representative review the document(s)?
6. Do your developers schedule time for document reviews? (If not, tell them to plan to add it.)
7. Can user testing be arranged to ensure the document(s)' usability, readability, clarity, etc.?
8. Where can user testing be held?
9. How will user testing be performed?
10. How will this affect the document schedule? (e.g., add to it, delay it, increase it, postpone finish date?
11. Who will arrange getting the users together and preparing the test facility? (e.g., systems personnel to set up computers; facilities specialist to arrange desks, chairs, overhead projector, white board, etc.; secretary for copying procedures, notifying users, scheduling test room, etc.)

Scheduling

1. Based on experience from previous projects, what is your feel for the time to write the document(s)?
2. What is the timeline for the project? (i.e., when should the final document(s) be complete)
3. What phases does the project go through? (e.g., beta; documents adhere to same phases and go through the review process in parallel with those phases.)

4. What is your procedure for handling deadline slips? How can we ensure that I am advised of such situations?
5. How do you wish to handle reviews/milestones?
6. What is your procedure for handling software changes that effect the documentation? How can I be sure I'm advised of such changes?

Administrative Issues

1. What is your internal name for this project?
2. What is the correct spelling/usage of your corporate name?
3. Who am I reporting to for this project?
4. How do you want to handle status reporting/periodic deliveries?
5. How often do you want invoices submitted? And to whom?
6. How much descriptive info should be on the invoice?
7. What expenses are covered for travel and other needs? (e.g., flight, car rental/taxi, hotel, per diem, ISP, travel/flight insurance, etc.)
8. What receipts are required for expense reporting? (Some companies allow a per diem (e.g., $40.00 per day for meals and incidentals) for which no receipts are required.) Are photocopies acceptable?

Miscellaneous

1. What concerns/issues do you have regarding telecommuting?
2. If necessary clarify your own work habits, requirements, etc. with the client.